



Health Researcher Use of the Internet and Social Media Tools



FDA Public Hearing, November 12-13, 2009
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AGENDA

– Health Researchers use Pharma Sites in a Distinct way

Vastness of content viewed in research process

Motives behind use of health content

Researchers preferred sources for type of information

Content availability by source

Content influence by type

– Researchers Get Online Health Information In A Variety of Ways

Top drivers of online health traffic

Changes in search activity changes the content researchers access

Media's latent effect on search activity

– Social Media Has A Similar Degree of Influence as the Internet As A Whole

Social Media driving an exchange of health information

Motives in Social Media usage

Top Social Media sites

Social Media drives action



91 million Americans per month use the internet to access health information at over 1,700 dedicated health sites*

- On average, Health-content visitors made:
 - 4.9 visits to Health sites in the month and spent 35.6 minutes*
- 78% of Conditions Sufferers who are online visit a health-related site to learn more about their condition (as well as 56% of Caregivers)**

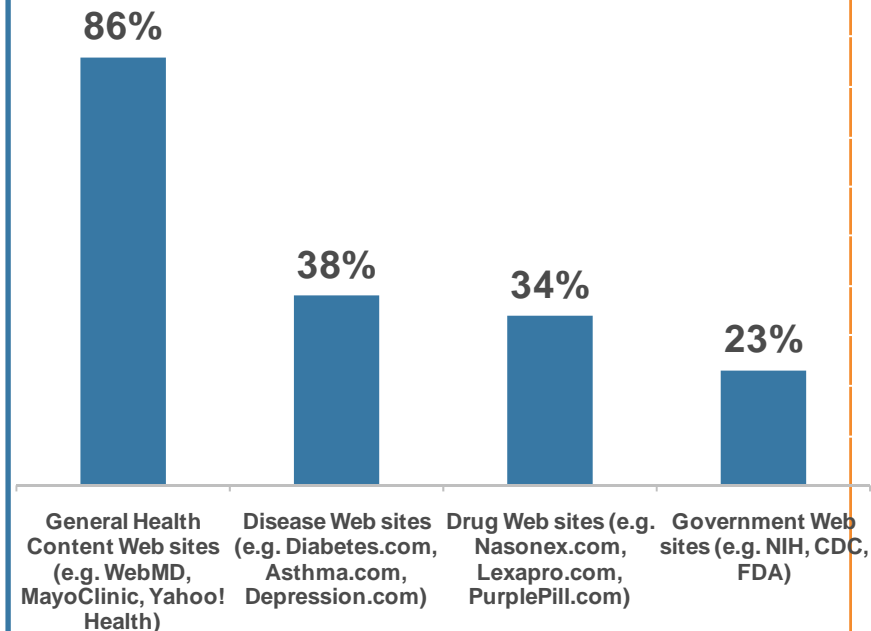
Pharma's role in online health research tends to be to provide incremental information to informed site visitors

- Initial condition education is often done at general health content sites
- Pharma site visitors have a higher degree of condition/treatment knowledge and higher propensity to be an existing treater using that brand

*comScore MediaMetrix Monthly Average: July 2009

**comScore Custom Research – May & June 2009 Total n=1002

Usage of Health-Related Web Sites Among Sufferers and Caregivers with a Health Condition



Source: comScore Custom Research – May & June 2009 Total n=1002 Visited
General n=754, Visited Disease n=329, Visited Drug n=295, Visited Government n=202

Pharma sites are a small percentage of the sites health researchers visit

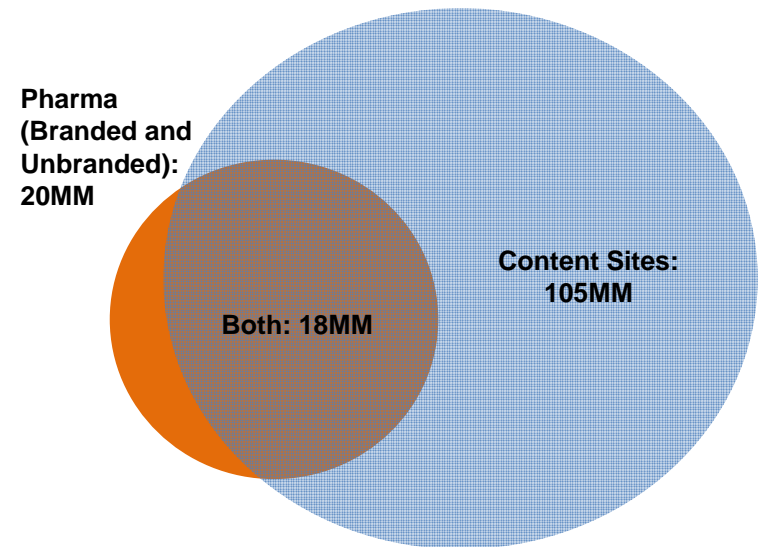
- Major Pharma and Content sites attracted 107MM Unique Visitors in Q1 2009
- Approximately 88% of visitors to the Pharma sites also visit Content sites
- Visitors to Content sites exhibited three times the visitation rates of Pharma site visitors
- The Content site visits also lasted on average 91% longer than visits to Pharma sites

	Visits (MM)	UV (MM)	Minutes /Visit*	Repeat Visitation	Cross Visitation	Reach Index
Content Sites	585	105	5.1	5.6	17%	47%
Pharma Sites	36	20	2.7	1.8	88%	9%

*Includes just domains

Source: comScore Marketing Solutions: Q1 2009 data

TOTAL Q1 2009: 107MM Unique Visitors

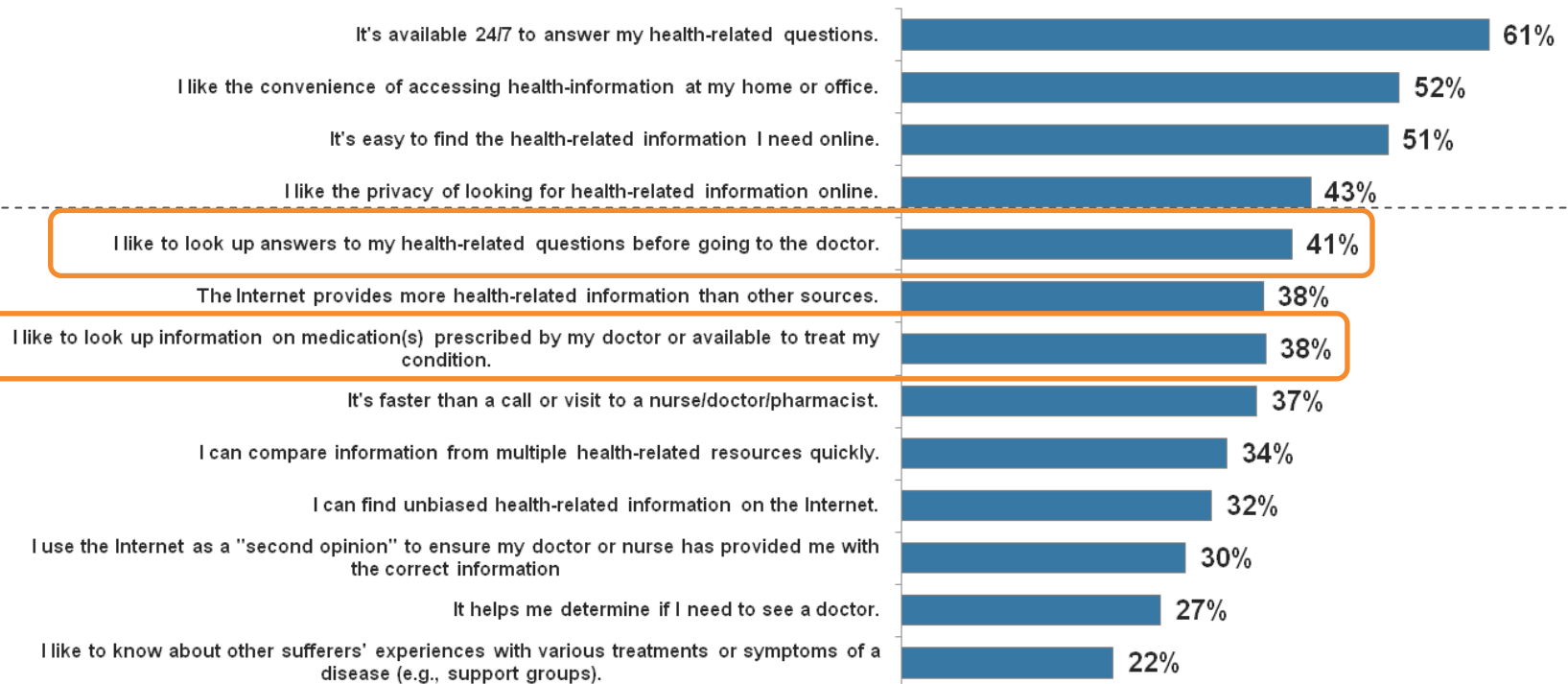


Source: comScore Marketing Solutions: Q1 2009 data

Availability and convenience are the top reasons for accessing health-related information online

Those in the latter stages of research use online health information to prepare for discussions with physicians or answer questions after script writing

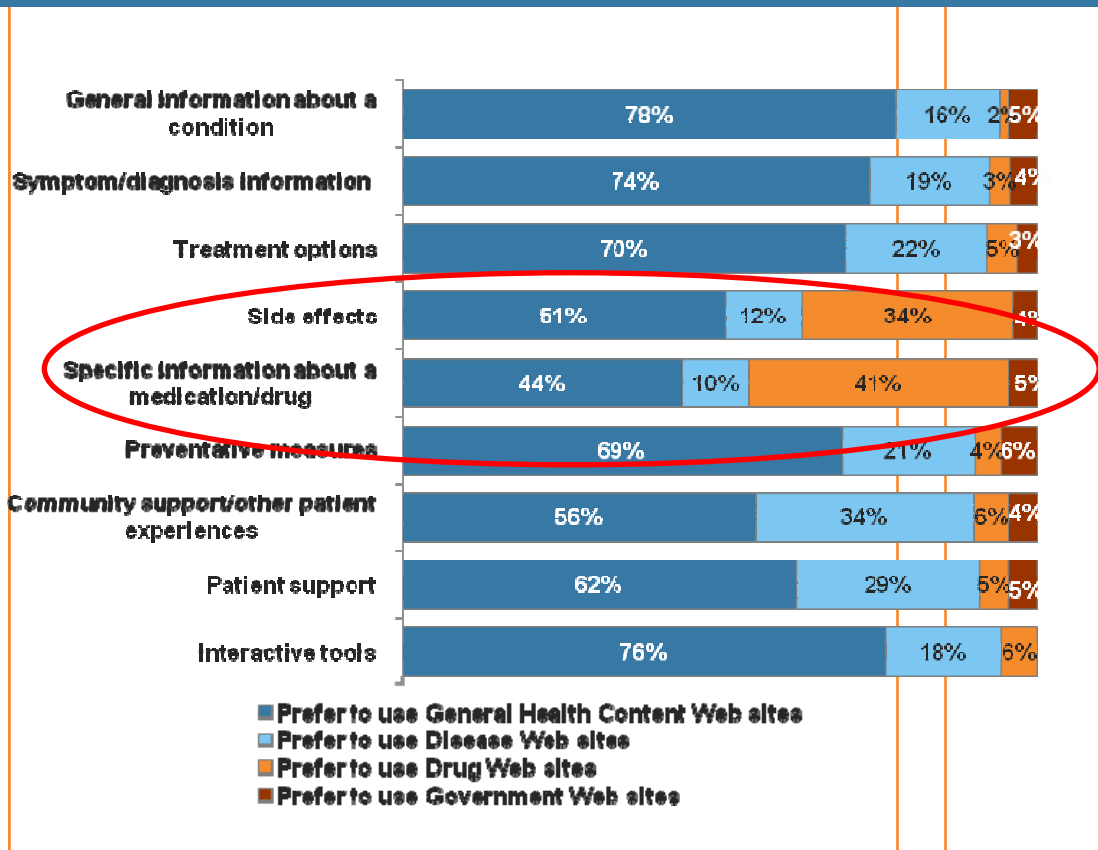
Motives Behind Using the Internet to Look for Health-Related Information



Source: comScore Custom Research — May & June 2009 Total n=1002

Health researchers go to pharma sites to learn about side effects and other specific information about the medication

Preferred Source for Type of Health Information



Source: comScore Custom Research – May & June 2009 Total n=1002 Visited General n=754, Visited Disease n=329, Visited Drug n=295, Visited Government n=202

- ISI and Side Effect info are a focus for Pharma site visitors as 34% of visitors prefer visiting the drug website to learn about side effects
- For the majority of pharma sites, Important Safety Information is included on nearly every page across the site

CASE STUDY:

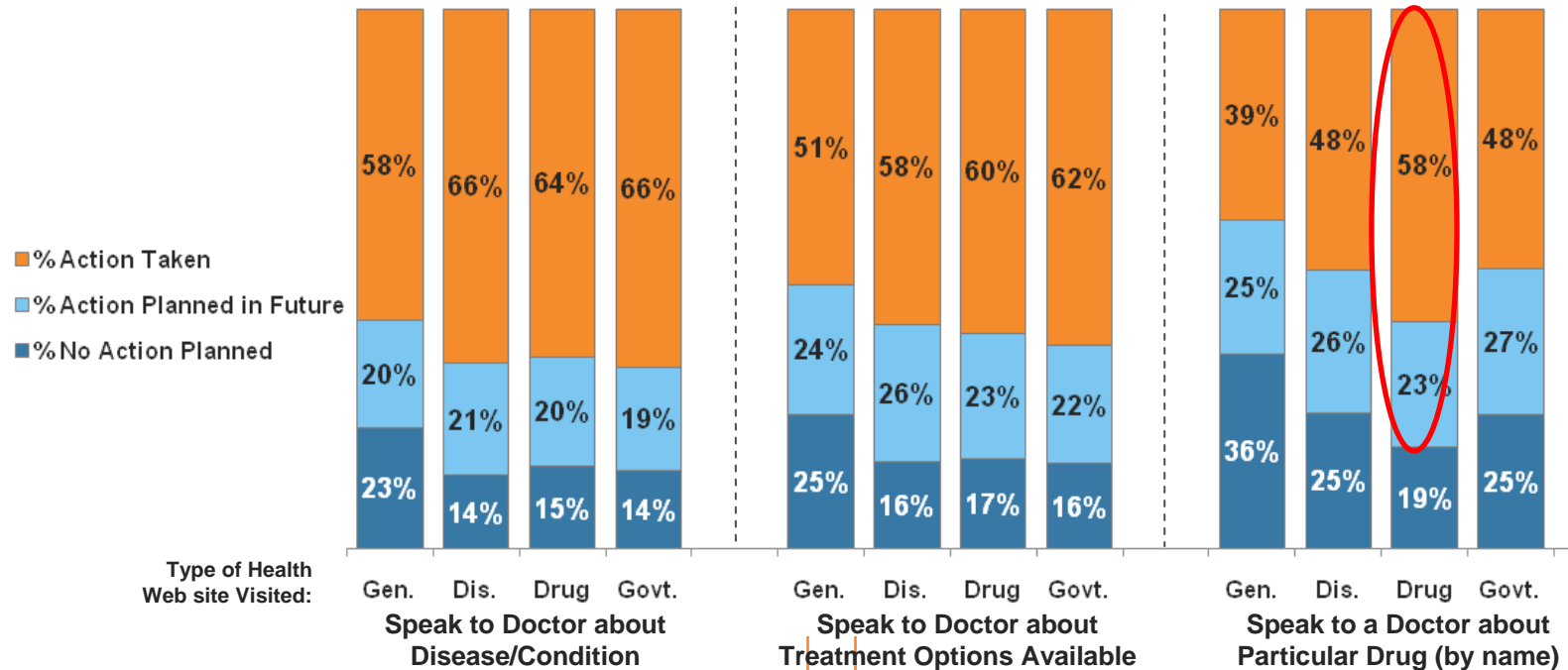
- The media exposure surrounding the H1N1 Virus resulted in nearly 40%* of all comScore panelist visits to tamiflu.com viewing dedicated ISI/side effect content pages.

*comScore Custom Marketing Solutions: Q2 2009 data

Pharma sites are very influential in driving sufferers to speak to their doctor about conditions and treatments

- Nearly three quarters of visitors to pharma branded Web sites will speak to a doctor about a particular drug

**Actions Taken as a Result of Health-Related Research Online
(by type of health website visited)**



Source: comScore Custom Research – May & June 2009 Total n=1002 Visited
General n=754, Visited Disease n=329, Visited Drug n=295, Visited Government
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Conclusion

■ Researchers Use Different Health Content in Different Ways

- Pharma sites educate sufferers of the treatment and side effects
- Pharma visitation is important drives sufferer visits to physicians and answers questions after a physician writes a script

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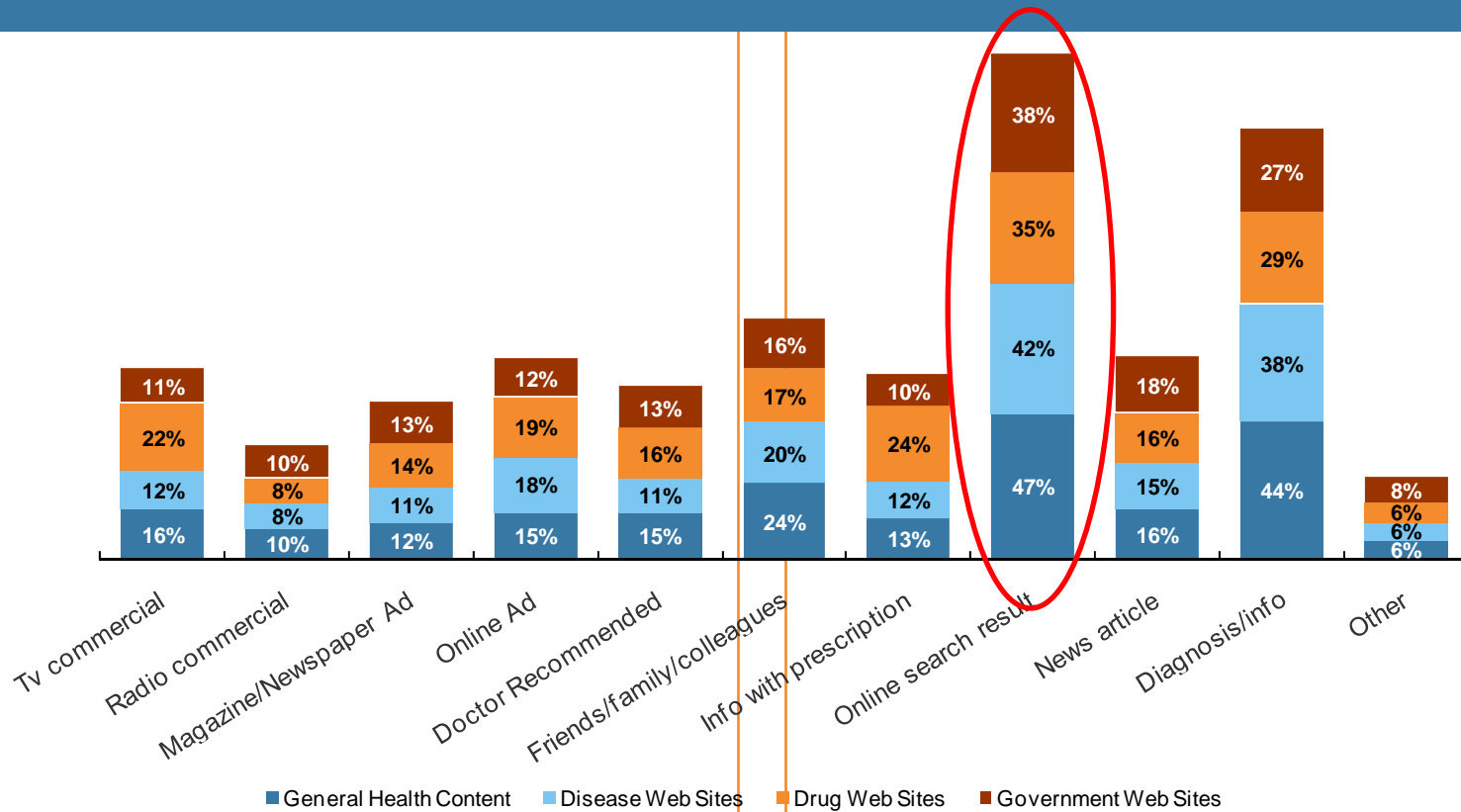
Top Social Media sites

Social Media drives action

While there are many drivers of site traffic, search engines are the greatest driver of traffic to health sites

- In Q1 2009, 652 million searches resulted in a visit to a health-related website, of which 11.5 million (2%) went to the top 91 Pharma brand sites

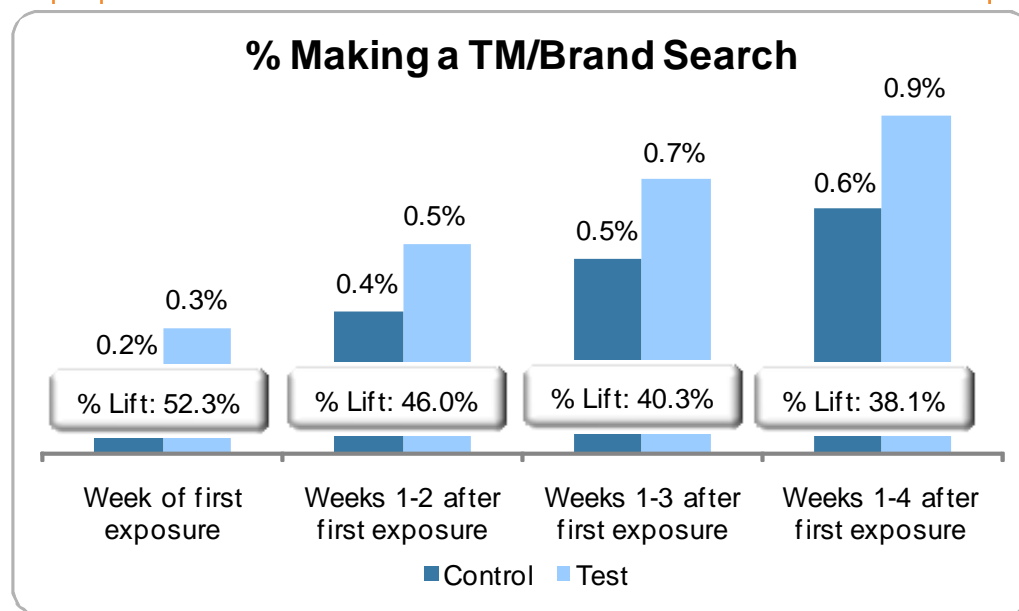
Influences Leading Visitors to Health-Related Sites



Search activity is influenced by the other activities, often reflecting 52% incremental searches in the first week of exposure

comScore behavioral studies consistently show that online display advertising has a significant affect on search activity.

- A test is identified of those exposed to an online media campaign
- A behaviorally identical control of those not exposed to the campaign is identified
- The differences between the two groups identify the effect of the display campaign



Source: comScore Campaign Effectiveness, results from 139 studies

In this example, search activity in the control is influenced by offline media and brand awareness

Conclusions

▪ Researchers Use Different Health Content in Different Ways

- Pharma sites educate sufferers of the treatment and side effects
- Pharma visitation is important drives visits to physicians and answers questions after a script is received

▪ Paid search is crucial to a drug brand's site traffic

- Search is used by those exposed to other media campaigns who are looking for more information
- Pharma brand and condition searches are often a result of other medias prompting a search
- A reduction in search activity drives a reduction in site visitation for researchers who ultimately seek brand specific information and side effect information

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Social Media is becoming an important influencer in the exchange of health information

- **Social media creates opportunities for sufferers to exchange information on a large scale with privacy and anonymity**

- Using Social media to learn about health topics is growing quickly with over 53% of internet users stating they have used social media to discuss health topics*

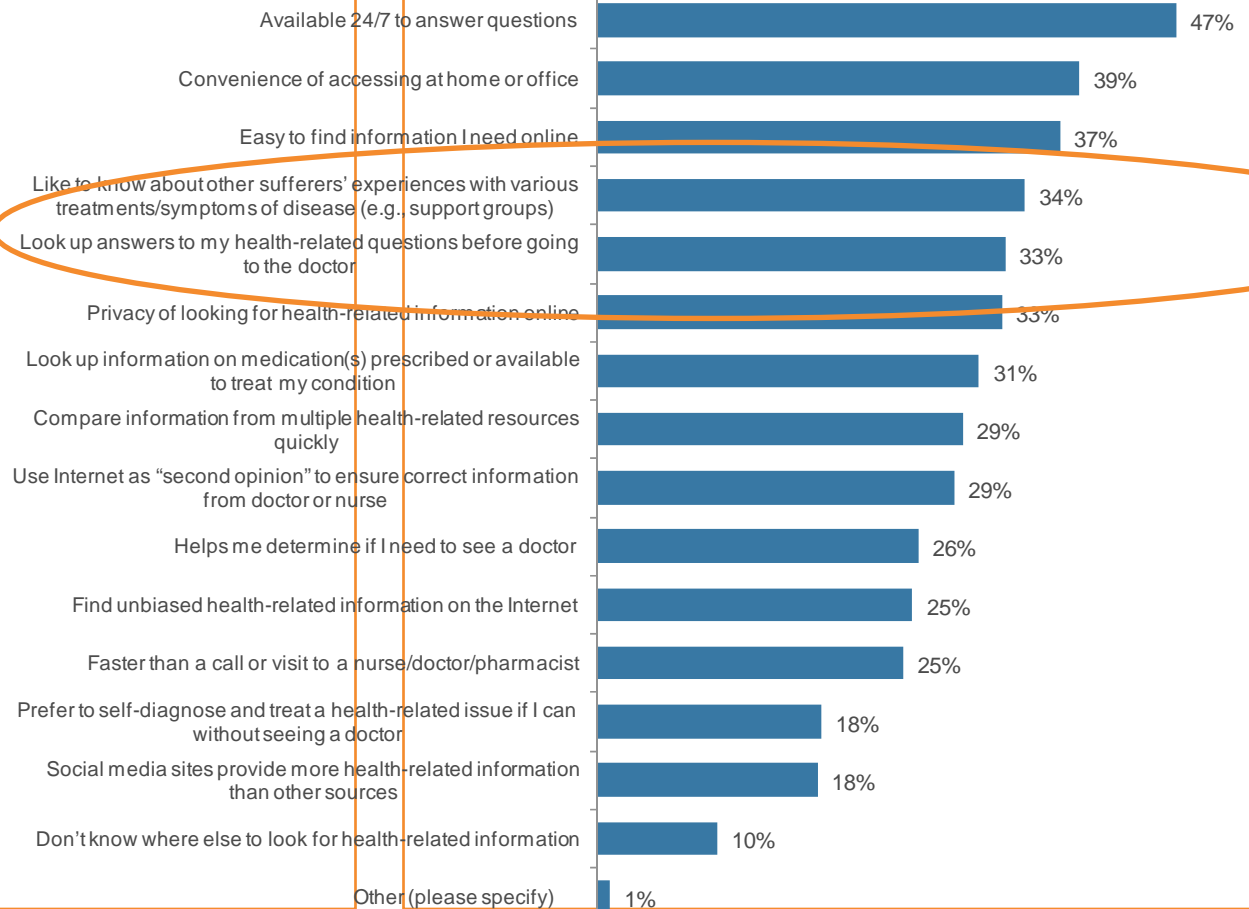
- **Social Media users find the information they find valuable**

- 46.7 percent of visitors believe social media sites help them make more informed medical decisions*

- **Social Media Users also know the content has its limitations**

- Only 35.2 percent trust the majority of information that they read on these sites*

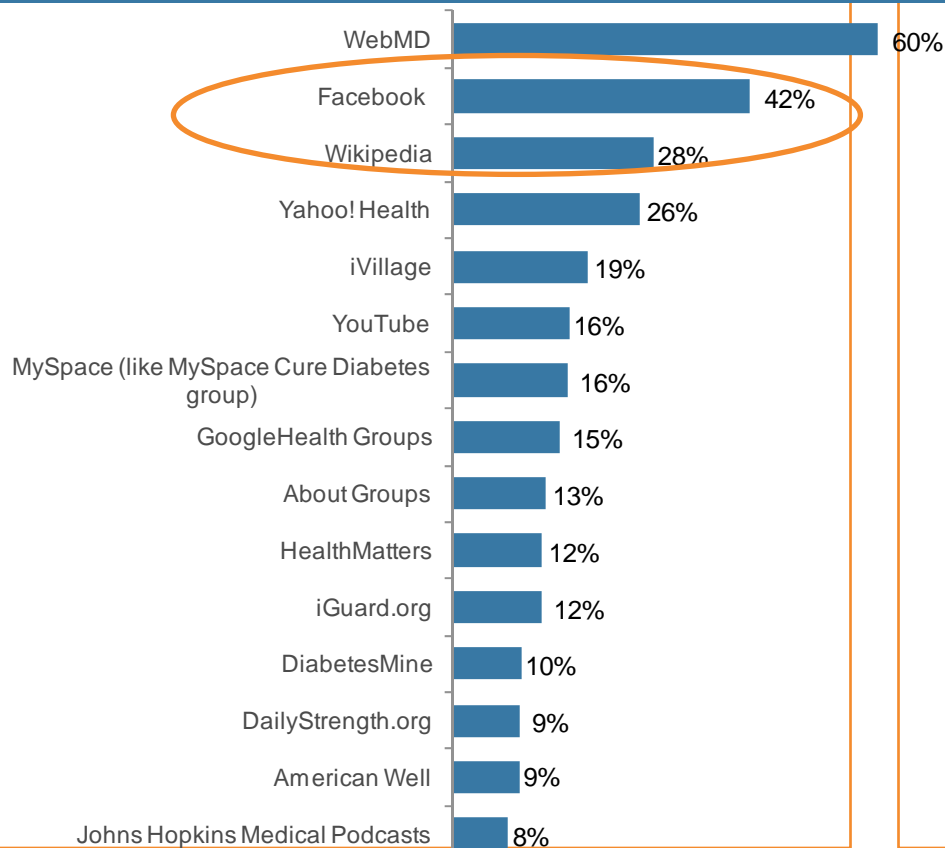
Why do you use social media sites to look for health-related information?



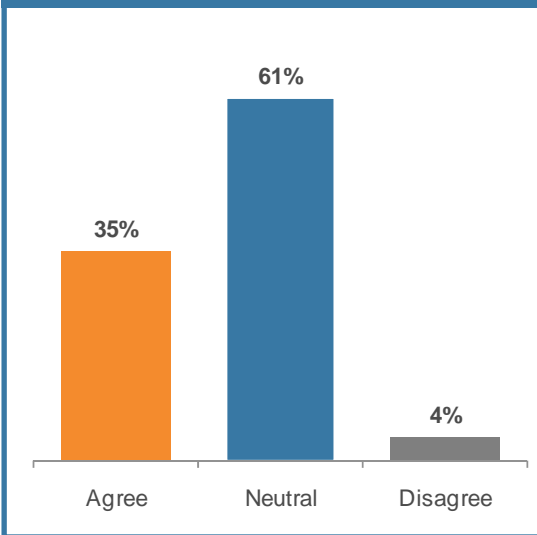
60% of visits to social media sites for health information exchange went to WebMD

The second most popular Social Media sites to exchange health information are Facebook and Wikipedia

Top Social Media Sites Used for the Exchange of Health Information



I trust the majority of information I read on social media websites.



Most users of social media sites understand the limitations that user-generated content presents

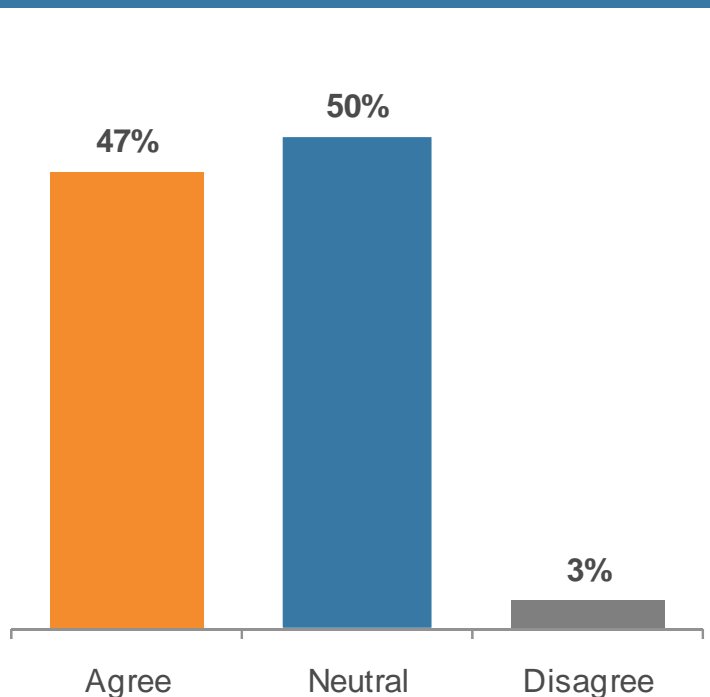
Source: comScore Social Media Custom Research – July 2009 Total n=1048

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Nearly half of visitors to social media sites agree that the exchange of health information helps them make more informed decisions and discuss conditions and treatments with doctors

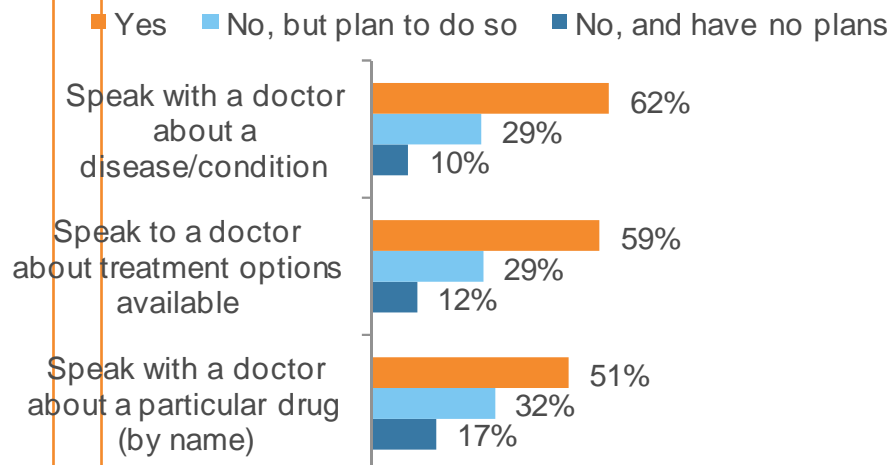
Of those participating in Health-related Social Media activity, 90 percent visit or plan to visit a doctor

I believe that information from social media sites allows me to make more informed medical decisions.



Source: comScore Social Media Custom Research – July 2009 Total n=1048

Did your research on health-related social media sites cause you to talk to or ask your doctor about each of the following?



Source: comScore Social Media Custom Research – July 2009 Total n=1048

Conclusions

▪ Health Researchers Use Different Health Content in Different Ways

- Online health researchers use a drug brand's drug site to learn more about the treatment itself and the side effects associated with the brand.
- This visitation is an important part of a patient's treatment process and supports driving visits to physician and supports a patient's dialog after receiving the script

▪ Paid search is crucial to a drug brand's site traffic

- Search is used by those exposed to other media campaigns who are looking for more information
- Pharma brand and condition searches are often a result of other medias prompting a search
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▪ Social Media is growing at a high rate as condition sufferers use it to learn more about conditions and treatment albeit admit the sources are not always credible.

- They value the views presented by other posters but have a lower degree of trust in the content.
- As more discussions (often by those less qualified than a physician or company supporting HCPs) are viewed it is crucial that credible and qualified information is more accessible and as easy to obtain as the less qualified views.

About comScore Pharmaceutical Solutions

- **Provide online measurement to online marketers**
- **Confidentially measure the continuous online behavior of consumers and physicians to determine behavioral trends and size market opportunities**
 - **Consumers:** Our 2 Million person consumer panel is a representative cross-section of the U.S. population, worldwide regions and individual countries
 - **Physicians:** Our 800 person physician panel allows for the first behaviorally tracked online physician panel that correlates online behavior with prescription and pharma rep behavior
- **We also have permission to:**
 - Survey panelists
 - Match to third-party databases
 - Append offline data
- **Non-Panel based solutions include:**
 - Site served behavioral and attitudinal measurement
 - Ad served attitudinal measurement tools
- **Our products and solutions provide our customers deep insights into consumer behavior, both online and offline**

comScore Customer Knowledge Platform: A Continuous 360° View of 2 Million Global Internet Users

WEB VISITING & VIEWING

- All Website/Page Click Stream
- Content Viewed
- Search Engine Queries
- Keywords Used

ONLINE TRANSACTIONS

- All Secure Session Activity
- Purchases and Subscriptions
- Price Paid, Shipping & Handling, Promotions
- Applications/Configurations

MARKETING STIMULI

- Online Ads (clicked or not)
- Referral Links



TV VIEWING

- Link to Digital Set Top TV Data using Name and Address

DEMOGRAPHICS

- Self-reported and validated
- Appended Segments (e.g. Claritas, Acxiom)
- Individual & Household Level

SURVEYS

- Email or Contextual “Pops”
- Behavior-activated Surveys
- Observation of All Surveys Taken Across All Suppliers

OFFLINE PURCHASING

- Linked using Name and Address
- Client CRM Databases
- Retailer Loyalty Card Data
- IRI Scanner Panel Data

Designed to be representative of the online population
TRUSTe certified for information privacy & security



About comScore, Inc.

- **Founded in 1999**
- **Corporate headquarters: Reston, VA**
 - Offices in Chicago, NYC, San Francisco, Seattle, Toronto, London, and Tokyo
 - 500+ full-time employees
 - Fastest growing global research firm
- **Experienced senior leadership team with an outstanding record of innovation in the market research industry**
- **Created the only continuous survey panel that also passively captures all web-wide behavioral and transaction data for a sample of 2 million people**
- **More than 1000 clients**

Advising Hundreds of Leading Businesses (partial list)

Telecom



Financial



Retail



Travel



CPG



Pharma



Technology

